Job Aid:
How to Score and Award a Bid

This Job Aid shows how to:

- How to score and award a bid using the bid tabulation function.

Of Special Note:

The bid tabulation function in COMMBUYS is used to score and review vendor responses to bids (called **quotes** in the system). The entire process - bids, quotes, scoring guidelines, etc. - is viewable in COMMBUYS, which offers users the benefit of concise document management as well as an organized electronic procurement file. Use of this bid tabulation function is optional. If bid tabulation is not used to score a bid, this information can be entered on a spreadsheet (or as follows current practice) and posted as an attachment on the Attachments tab.

The Scorecard is an assessment tool used to evaluate quotes in COMMBUYS. Scoring criteria is based on a weighting system of a total of 10. Each criterion will have a value (or "weight") assigned as a percent. The total of all criteria combined must equal 100. The scores against those weights are recorded numerically from 1 to 99. After criteria are entered, the purchaser forwards a request to a group of approvers who use the criteria to evaluate (score) the bid.
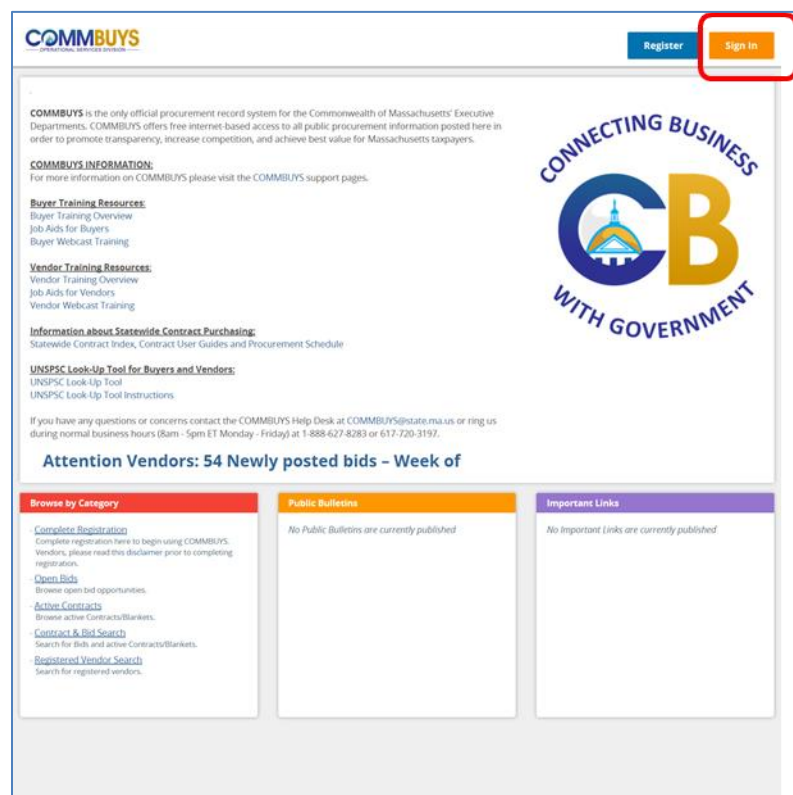
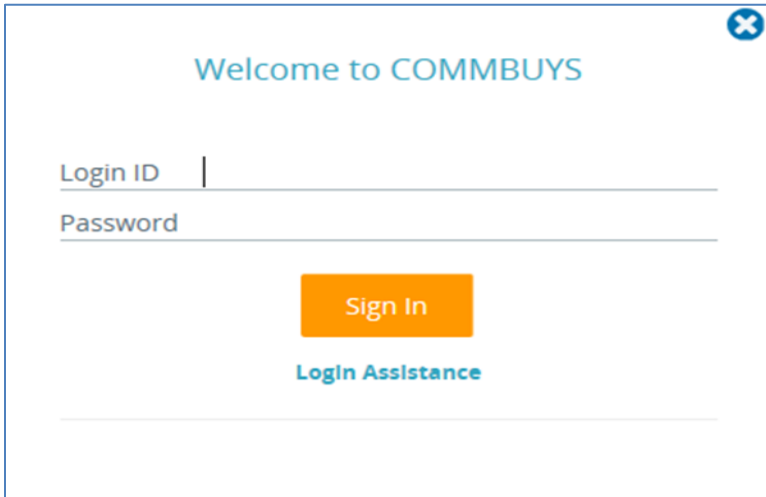| Screenshot	Directions
	Step 1: Log-in to COMMBUYS 1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com) in the browser or by clicking the hyperlink COMMBUYS. 2. Click on the orange **Sign In** button in the upper right hand corner.

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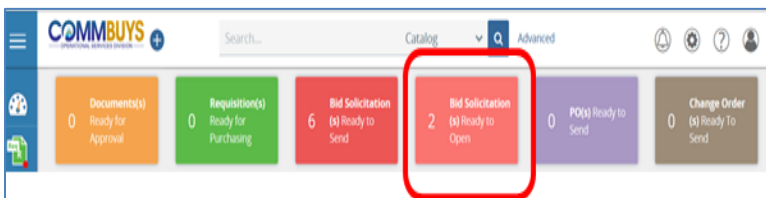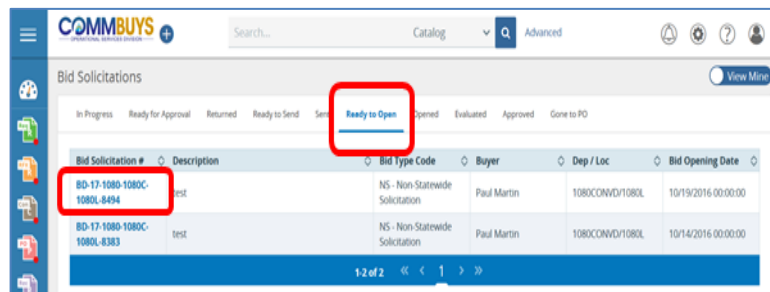| Screenshot	Directions
	Step 2: Logging In 1. Enter your **Login ID** and **Password.** 2. Click on the **Sign In** button.
	Step 3: Opening Ready to Open Bid Solicitations From the Main Menu, click on the **Bid Solicitation(s) Ready to Open** box.
	Step 4: Selecting the Bid 1. The Bid Solicitations screen displays. Click on the **Ready to Open** tab. 2. Click on the blue hyperlink of the desired bid in the **Bid Solicitation #** column.

Screenshot	Directions
There is no item accounting available for this item. **Pre-Bid Approval Path:** **Approval Path** Delete Order Approver Alternate Level Date Requested Date Action Comments Sequence Approver 1 Paul Martin 1 09/30/2016 01:50 PM 09/30/2016 01:50 PM Approved (Paul Martin) [Open Bid] Cancel Bid Clone Bid Print © 2016 Periscope Holdings, Inc. - All Rights Reserved.	**Step 5: Opening the Bid** The Bid opens to the Summary tab. Scroll to the bottom of the page and click on the **Open Bid** button.
Pre-Bid Approval Path: **Approval Path** Delete Order Approver Alternate Level Date Requested Date Action Comments Sequence Approver 1 Paul Martin 1 09/30/2016 01:50 PM 09/30/2016 01:50 PM Approved (Paul Martin) [Bid Tab] Cancel Bid Clone Bid Print	**Step 6: Opening the Bid Tab** When the Summary screen redisplays, scroll to the bottom and click on the **Bid Tab** button.
Bid Tabulation for Bid #BD-17-1080-OSD06-OSD06-8683 Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary **Back to Bid** Total Number of Submitted Quotes: 2 Consider All Quote # Description Vendor ID Vendor Name Submit Date Attachments ☐ ☑ QT-1080-OSD06-OSD06-15858 test 00020012 Vramerica 11/08/2016 12:38:39 PM No attachments ☑ QT-1080-OSD06-OSD06-15859 test 00020013 lane 11/08/2016 01:02:45 PM No attachments Create New Quote Save And Continue --- Vendor Profile - Kramerica Organization Information **Program** Users Address Commodity-EPPs and Services Regions Terms & Categories Attachments Vendor Performance **Programs** **Program Details** Program: SBR Program Status: Active Certification: Certified Date Qualified: 03/15/2016 Renewal Date: 09/15/2017 Acknowledged program Acknowledged Date 09/15/2016 User Last Cosmo Date Last 09/15/2016 conditions?: Acknowledged/Disagreed: Updated: Kramer Updated: Close Window	**Step 7: Identifying SBPP Vendors** The **Bid Tabulation** page opens displaying the list of all quotes submitted by registered COMMBUYS vendors for the selected bid. If your procurement is a small procurement, ($150,000 or less), you must identify SBPP-active vendors. If your procurement is over $150,000, skip to step 8. In order to identify whether vendors submitting quotes are SBPP-active, follow these steps. 1. Click on a blue hyperlink in the **Vendor ID** column, which brings up that Vendor's profile in a separate window. 2. Click on the **Program** tab and see if the Vendor has the code SBR (Small Business Registered) and *Active status*. 3. Make a list of all SBR-Active vendors who have submitted quotes.

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Screenshot	Directions

	Step 8. Completing the Score Tab
	
	1. To begin the scoring and evaluation process, click on the **Score** tab. The Score tab consists of three sub-tabs:
	
	• **Maintain** – used to enter and display the criteria, criteria weights, and select scorers
	
	• **Score Entry** – used to enter and display individual vendor scores based on vendor quotes
	
	• **Score Summary** – displays a side-by-side view of all entered vendor scores
	
	2. Enter a scoring criterion name in the **Scoring Component Description** field.
	
	3. Enter a scoring weight percentage in the **Weight** field.
	
	4. Click on the dropdown arrow next to the **Scorer Name** field and select a scorer.
	
	5. Check the boxes that are applicable for your Bid evaluation:
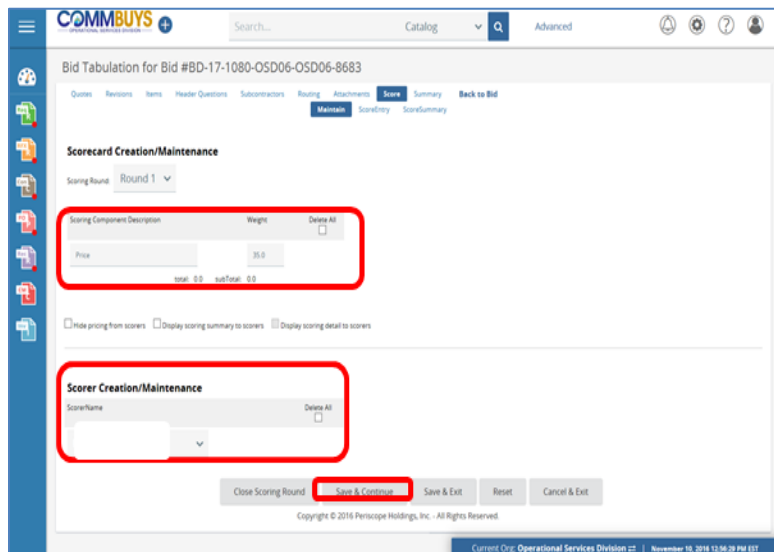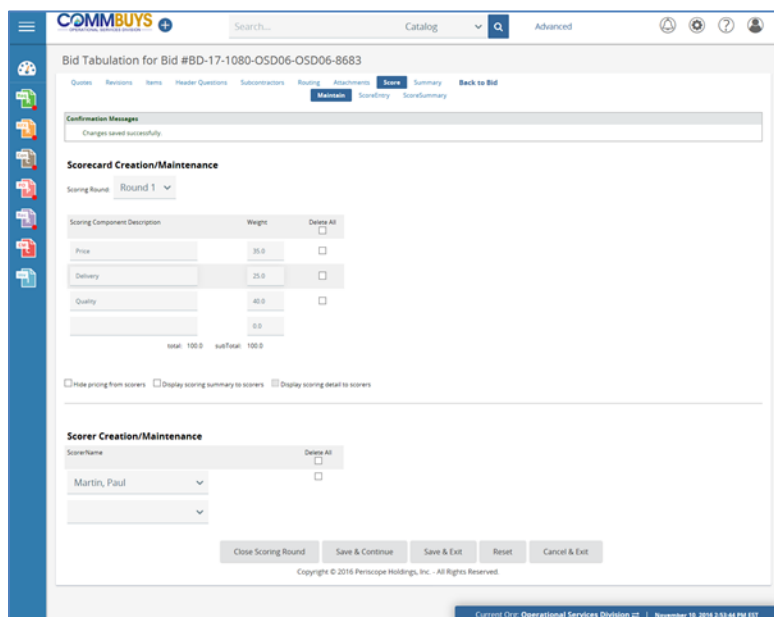	
	    Hide pricing from scorers
	
	    Display scoring summary to scorers
	
	    Display Scoring Detail to scorers
	
	6. Click on the **Save & Continue** button.
	
	NOTE: If you enter a weight less than 100, the screen will redisplay with a red error message indicating that the weights do not add up to 100. Continue adding criteria until the weight totals 100. Likewise, you will receive a red error message if you fail to select a scorer.

Screenshot	Directions
	Step 9: Opening a Quote 1. Click on the **Quotes** tab to review the bids prior to Score Entry. 2. Click on a blue hyperlink in the **Quote #** to open a vendor quote.
	Step 10. Reviewing a Quote The quote opens in a new pop-up window to the **Summary** tab. All vendor quote information is stored in the displayed tabs. 1. Review all information in all tabs (including any submitted attachments) to evaluate the vendor quote. 2. Click on the **Close Window** button. 3. Repeat Steps 9 and 10 for each vendor quote.

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Screenshot	Directions
	Step 11. Entering Scores 1. Click on the **Score** tab. 2. Click on the **Score Entry** sub-tab. 3. Click on the dropdown arrow next to the **Vendor** field and select a vendor. 4. Enter a score in the **Raw Score** field for each criterion. COMMBUYS will automatically multiply the raw score times the weight and provide an **Extended Score**. 5. If desired, enter notes in the **Note** field. 6. Click on the **Save & Continue** button. 7. Choose the next vendor from the vendor dropdown menu and repeat the process until all vendor quotes have been scored.
	Step 12: Viewing the Scores 1. Click on the **Score Summary** sub-tab. 2. The **Score Summary tab** displays the weighted scores side by side for easy review. Hyperlinks to **View Score Detail** are available for each vendor and buttons are available to **Print Summary** or **Print Detail**.

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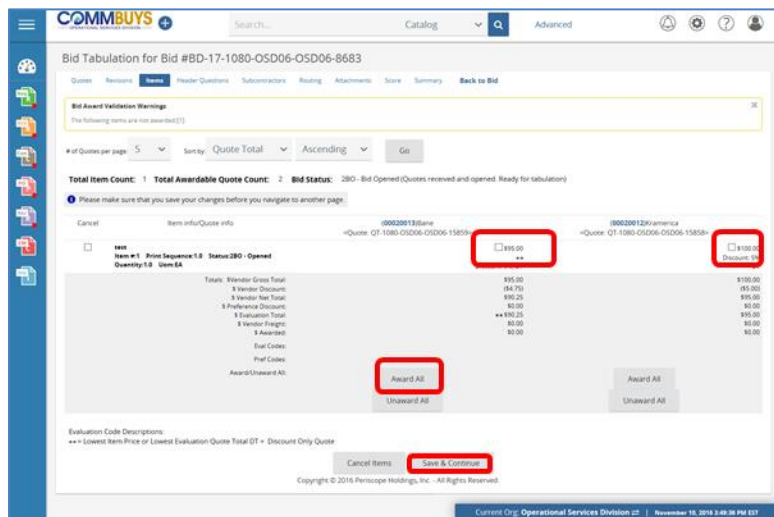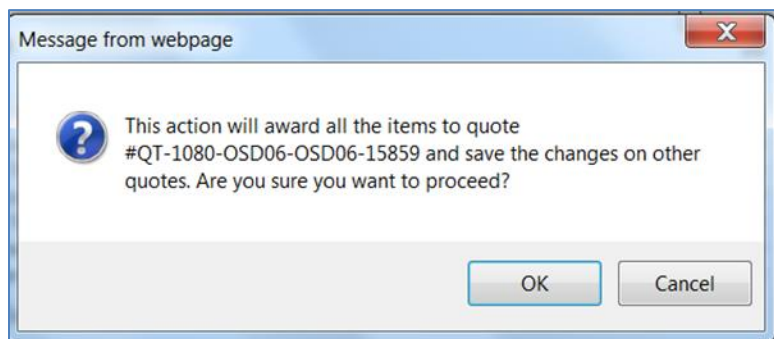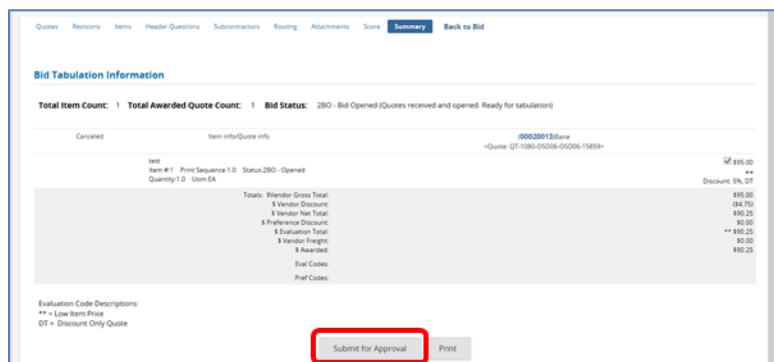| Screenshot	Directions
	Step 13. Selecting Vendors for Award 1. Click the **Items** tab to view and make the award. 2. To award all lines of the bid to a single vendor, click on the **Award All** button in the correct Vendor's column. To award a multi-line bid to different vendors, click on the **checkbox** on each line under the vendor who will receive the award. **NOTE:** If you choose **Award All**, a popup message will appear asking if you are sure you want to proceed. If so, click on the **OK** button. 3. After the award decisions are complete, click on the **Save & Continue** button. **NOTE:** For small procurements (those less than or equal to $150,000) refer to the SBPP Policy.
	Step 14. Awarding the Bid 1. Click on the **Summary tab** to view the awarded vendor(s). 2. Click on the **Submit for Approval** button.
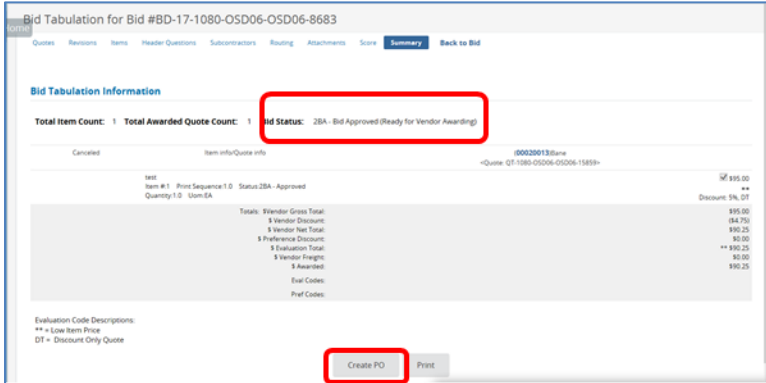
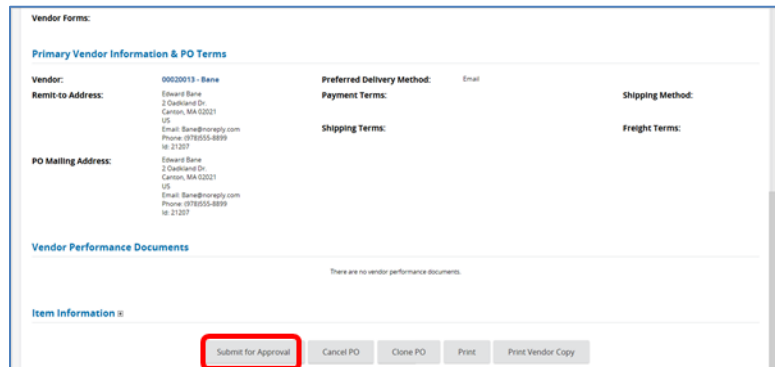| Screenshot	Directions
	Step 15: Creating a PO Once the evaluated bid has been approved, it will be in **2BA – Bid Approved** status. Go to the Summary screen of the Bid Tabulation and click on the **Create PO** button at the bottom of the page.
	Step 16. Generating an MBPO The PO Creation Preview page displays. Any of the pre-checked boxes can be deselected; however that information will then need to be filled in manually. Click on the **Continue** button to generate a Master Blanket Purchase Order (MBPO) from all the information listed in the Bid and Bid Tabulation tabs screens.
	Step 17: Opening the PO The Bid Summary tab screen displays with the new PO number. To open and edit and/or submit the MBPO, click on the blue hyperlink **PO #**. NOTE: The PO is created and will be marked *In-Progress* if you wish to return to COMMBUYS at a later date.

Screenshot	Directions
	Step 18: Submitting the MBPO for Approval

The PO will open to the **Summary** tab. It is In-Progress and therefore edits can be made if required.

Click on the **Submit for Approval** button once you are ready to finalize the MBPO. |
| | **Step 19: Finalizing the MBPO**

Once the MBPO has gone through the appropriate approval path it is in a **Ready to Send** status.

1. The PO will open to the **Summary Tab**. At the bottom of the page, select from one of the two options:
   - **Send Email and Notify Vendor**
   - **Set to Printed Status** (still posts the purchase order on COMMBUYS but does not send any vendor emails)

2. Click on the **Save and Continue** button to finalize the MBPO and place the order. The status changes to **Sent.** |